



## » Horse-riding/ Pony-Trekking

MARKET RESEARCH 2013

### » Current Market Performance

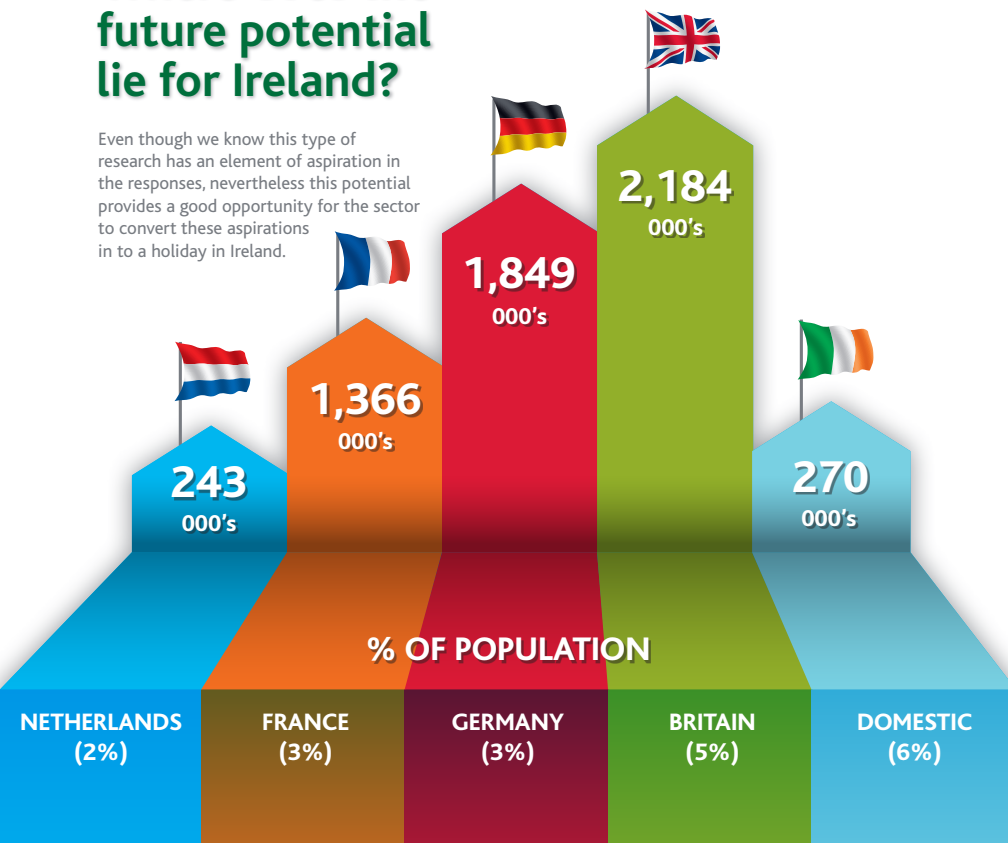
Share by market:

- Britain (15%)
- Mainland Europe (52% - of which Germany 11%; France 8%);
- North America (23%)
- Other long haul (10%)



### » Where does the future potential lie for Ireland?

Even though we know this type of research has an element of aspiration in the responses, nevertheless this potential provides a good opportunity for the sector to convert these aspirations in to a holiday in Ireland.



## » Future Market Potential

In market research commissioned by Fáilte Ireland in 2013, nearly 15,000 interviews were conducted across the Irish and four key overseas markets of Britain, France, Germany and the Netherlands.

The following sets out the 'core' market potential opportunities and challenges for the equestrian offer in Ireland.

- Horse riding/ pony trekking is of greater interest to the British than to the mainland European markets. Britain, like Ireland, has a more natural interest in the sport.
- As opposed to some of the more generalist activities such as walking or cycling, horse riding is a much more specialist interest activity and would need careful targeting in order to see a return on investment.
- The domestic market offers more interest in horse riding/ pony trekking than mainland Europe, with a core potential of around 400,000 offering a good opportunity to develop this.

### » Who are our competitors?

- In Britain, success in attracting horse riders to Ireland will depend on getting them out of their own country to do so.
- England (79%), Scotland (76%) and Wales (74%), provide stiff competition for Ireland.
- Even Spain (76%), France and Italy (69%) do slightly better than Ireland, however this is probably due to weather.
- In comparison, 65% of British people who represent our target audience would consider horse riding/ pony trekking in Ireland in the next 3 years.
- For the domestic market 69% of Irish people who have participated in this whilst on holiday have done so in Ireland.
- This is followed by England (12%) and Spain (12%), indicating that the domestic market for equestrian pursuits is quite strong and has little competition from outside competitors.

<sup>1</sup> Core Market Potential: those that have participated in this activity whilst on holiday abroad in the last 2 yrs, and would consider participating in this activity on holiday in Ireland in the next 3 yrs.

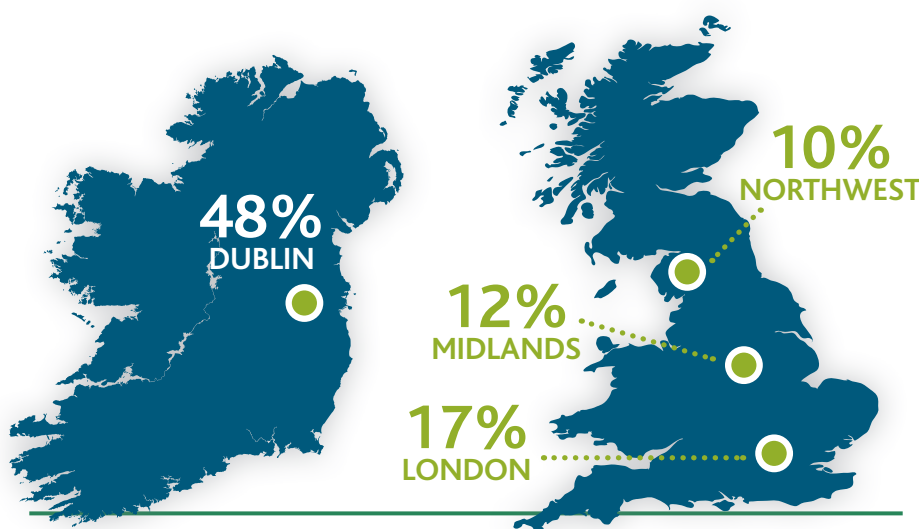
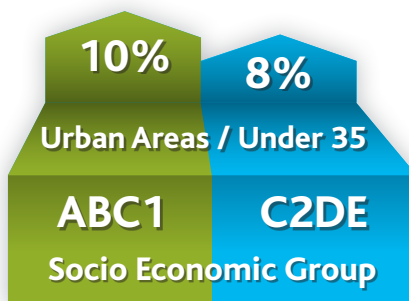
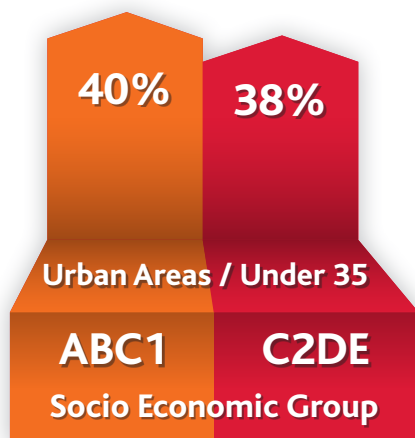
## » Market Profile - Who are these people?



IRISH MARKET



BRITISH MARKET



## » Key Points on Horse-riding in Ireland

- The British and domestic markets offer the best opportunities for horse riding and pony trekking offering Ireland with a core market potential of just under 2.5 million people
- Due to the high proportion of blue collar C2DEs in the British core market there could be an opportunity here to develop a 'value' or low cost offer in order to tap in to the potential here, as cost will be essential to converting this segment.
- The Irish offering is rated well amongst overseas markets including the British however it would seem that the things which are good about horse riding and pony trekking in Ireland are the things about which people are least aware.
- The domestic market is more critical of Ireland, particularly in relation to value for money, however the quality and standard of the offering is well regarded.
- What can be seen across all activities is that beautiful landscape is the main reason for coming to Ireland. Activity-doers appear to think destination first and then consider whether it would be good to do a particular activity there.
- The holiday experience is what matters in destination choice; whether the country is set up for activities comes second for most.
- Promoting Ireland as an activities destination therefore is about using Ireland's USP in same way as for general marketing; the activity is a means of enjoying the Ireland experience.

## » What are people's perceptions of horse riding/ pony trekking in Ireland?

### OVERSEAS<sup>2</sup>

- Ireland's offering was well rated amongst those that gave an opinion.
- Quality of the offer, followed by range of choice and standard of the equestrian centre were rated the highest, which all indicate the product on the ground is of good quality and can meet visitor needs.
- However the practicalities of booking and the availability of information need some improvement.
- Across all areas the levels of awareness could be improved, but particularly in relation to the standard and quality of the offer available. These are the things Ireland does well but which potential visitors are least aware of.

<sup>2</sup> Ratings from the important British market are similar to those given by other nationalities.



**I had no idea there was a horse trekking holiday option in Ireland**

25-34 year old Briton, female

### DOMESTIC

- As for most activities the Irish are much more critical of the horse riding/ pony trekking offering in Ireland.
- Quite a significant proportion (16%) of respondents gave Ireland's value for money a strongly negative rating of 'poor'.
- Availability of information was also an issue but people do seem to broadly agree that the quality of horse riding on offer and the standard of equestrian centres in Ireland is good.